HealthEquity COBRA New Plan Member Import Specification

Version 1

# File Delivery Details

File Format

Comma delimited text file or CSV. Note: You should not use Excel to edit or save these files as Excel will alter the format of large numeric columns (such as SSN) and make them unreadable to the

File Frequency

Provide the file as needed to add new plan members.

File Naming Convention

NPM\_[SOURCE]\_[EMPLOYER].[YYYYMMDDhhmmss].txt|.csv

# Field Requirements

|  |  |
| --- | --- |
| **Indicator** | **Detail** |
| R | Required Field. Must be included on the file. |
| O | Optional Field. Should be included where available. |
| C | Conditional, may be required based on a specific configuration. |

# Data Types

The data types used in the various import sections are defined below.

**Note:**  The fields in the import file are all text fields (since the file is CSV format). The following definitions explain the formatting of the text in the corresponding field.

|  |  |
| --- | --- |
| Item | Detail |
| Text | Can be any text value up to the number of characters specified. If the text contains a comma, then the entire field should be enclosed in double quotes (“). If you need a double quote to be represented in the text then the double quote (“) must be escaped with a back slash (\”). To get the text - My “Cool” Company – you would represent it like this – My \”Cool\” Company - this escape character works inside other double quotes as well, for example “My “other” Company” would be represented by “My \”other\” Company”. |
| Numeric | Can be any number from 0 to 32,767. No punctuation |
| Date | Entered as MM/DD/YYYY, where MM is the month, DD is the day and YYYY is the year. You can use a single digit or two digit leading zero for the month and day. The year should always be entered as 4 digits. |
| DateTime | Entered as MM/DD/YYYY HH:mm AM, where MM is the month, DD is the day and YYYY is the year, HH is the hour, mm is the minute and AM is either AM or PM. You can use a single digit or two digit leading zero for the month, day, hour and minute. The year should always be entered as 4 digits. |
| Boolean | Where true can be represented by 1, Y, YES, T, or TRUE and false can be represented by 0, N, NO, F, or FALSE. |
| Currency | Format as number with one period, no commas and always have at least one digit to the left of the period and 2 digits to the right of the period. Example: 12 cents would be entered 0.12 |
| SSN | Format as 9 digits, with or without the dashes. Note that leading zeros are required if the SSN begins with zeros. |
| Phone | Format as 10 digits. |
| Email | Text (100), with at least one @ sign and at least one period (.) after the @ sign. |

# Import File Layout

The new plan import file is a CSV file where each line has values separated by commas. To allow for the importation of different types of information, the first field of each line defines what type of information will follow for the fields of that line. For instance, to begin the importation of a new plan member record, you will need a NPM line that starts with a line identifier of “[NPM]” and may appear similar to the following:

[NPM],111223333,223,MyClientName,MyClientDivisionName,Bob,L,Jones,MR,bjones@test.com,,...(etc).

All of the lines following the “[NPM]” line are related to that new plan member. When a new “[NPM]” line is encountered, the previous NPM record is validated and saved into the database and then the import process begins for the next NPM record.

# Line Identifiers

|  |  |  |
| --- | --- | --- |
| Line Identifier | Required to Complete a NPM | Description |
| [VERSION] | ⌧ | The file version indicator |
| [NPM] | ⌧ | The main new plan member record |

# Version Record

| **Record Type** | **Field Name** | **Column** | **Type** | **Required** | **Description** |
| --- | --- | --- | --- | --- | --- |
| Version | Record Type | 0 | Text | Y | Should always be set to [VERSION]  [VERSION] |
| Version | Version Type | 1 | Decimal | Y | Should always be set to 1.  1.0 |

[VERSION],1.0

# New Plan Member Record

The new plan member record is used for any new plan member that needs to receive an initial rights notice. This could be the primary insured or a spouse that is added to the plan later.

| **Record Type** | **Field Name** | **Column** | **Type** | **Required** | **Description** |
| --- | --- | --- | --- | --- | --- |
| NPM | Record Type | 0 | Text | Y | Should always be set to [NPM]  [NPM] |
| NPM | SSN | 1 | SSN | Y | SSN of the new plan member.  999999999 |
| NPM | IndividualIdentifier | 2 | Text (50) | O | Additional employee identifier, such as employee ID or department, if applicable.  Marketing |
| NPM | ClientName | 3 | Text (100) | Y | Name of the employer client as configured in the system.  ABC Company |
| NPM | ClientDivisionName | 4 | Text (50) | Y | The unique client division name configured in the system. If there are no divisions, then use the ClientName.  Location 26 |
| NPM | FirstName | 5 | Text (50) | Y | First name of the new plan member.  Samantha |
| NPM | MiddleInitial | 6 | Text (1) | O | Middle initial of the new plan member.  M |
| NPM | LastName | 7 | Text (50) | Y | Last name of the new plan member.  Smith |
| NPM | Salutation | 8 | Text (35) | O | Acceptable values are MR, MRS, MS, MISS, or DR  MS |
| NPM | Email | 9 | Email | O | Email address for new plan member, if available.  SamanthaMS@webdomain.com |
| NPM | Phone | 10 | Phone | O | New plan member primary phone number.  8115551717 |
| NPM | Phone2 | 11 | Phone | O | New plan member secondary phone number.  8115552727 |
| NPM | Address1 | 12 | Text (50) | Y | New plan member mailing address line 1.  123 Fort Street |
| NPM | Address2 | 13 | Text (50) | O | New plan member mailing address line 2.  Apt A |
| NPM | City | 14 | Text (50) | Y | New plan member mailing address city.  Springfield |
| NPM | StateorProvince | 15 | Text (50) | Y | New plan member mailing address state.  MA |
| NPM | PostalCode | 16 | Text (35) | Y | New plan member mailing address postal code.  00416 |
| NPM | Country | 17 | Text (50) | O | Leave blank if the new plan member resides in the USA. |
| NPM | Sex | 18 | Text (1) | Y | Acceptable values are M or F  F |
| NPM | UsesFamilyInAddress | 19 | Boolean | Y | Send as TRUE  TRUE |
| NPM | HasWaivedAllCoverage | 20 | Boolean | O | Send as FALSE  FALSE |
| NPM | SendGRNotice | 21 | Boolean | O | Send as TRUE. If omitted, the field defaults to TRUE.  TRUE |
| NPM | HireDate | 22 | Date | C | Required if NPM with same SSN exists. Null is valid. Letter will not go out if a member with the same SSN and Hire Date already exists. |

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# Sample Import File

The following text is the contents of a sample file that demonstrates the import of a NPM.

[VERSION],1.0

[NPM],552552222,1,TestClient1,TestClient1Division,Bob,Z,Jones,MR,bjones@test.com,4024445555,,1234 Some street,,Omaha,NE,68123,,M,T,F,F

[NPM],552553333,1,TestClient1, TestClient1Division,Walter, ,Smith,MR,wsmith@test.com,4024445552,,12343 Some street,,Omaha,NE,68123,,M,T,F

[NPM],333442222,2,TestClient1, TestClient1Division,Jorge,R,Rejo,MR.,test3@test.com,4444445555,,123 apt b str,,omaha,ne,68111,,F,T,F,T